ASHLAR

USER GUIDE

Prepared by Daniel Berry for Task 2 Requirement C of the WGU 868 Capstone Project.

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Introduction

The purpose of this guide is to help new users understand how to use the CRM as effectively as possible. The guide provides descriptions for the following:

1. How to register your account and create a team
2. How to sign into an existing account
3. How to create and manage companies, contacts, and deals
4. Creating and managing notes for companies, contacts, and deals.
5. Creating and managing task for companies, contacts, and deals.
6. How to associate contact, companies, and deals
7. How to search for companies, contacts, and deals
8. Using the module dashboards to generate reports based on filters

Accessing the Application

Because this is a cloud-based application, there is nothing to install on your local machine. You can access the application by visiting https://ashlar.app in your browser.

Demo Account

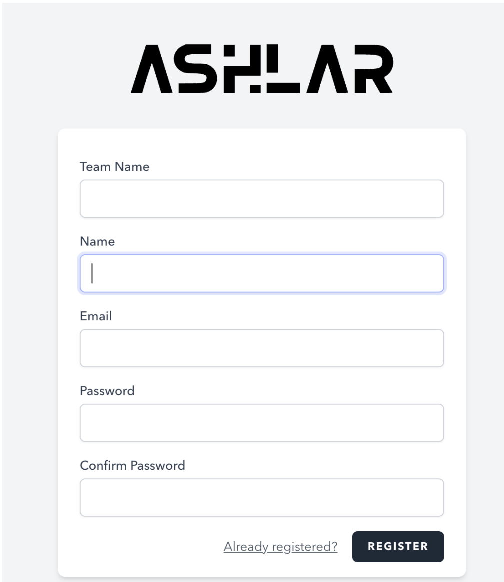
Many of the Ashlar's features require multiple users, companies, contacts, and deals to get the full effect. We have created a demo account, for convenience to allow you to test-drive the application with demo data. You can sign into the demo account by:

1. Visiting https://ashlar.app in your browser
2. Sign in with the following credentials:
    a. **Email:** jdoe@example.org
    b. **Password:** Wgu2023*

Registering a New Account

1. Visit https://ashlar.app/register in your web browser

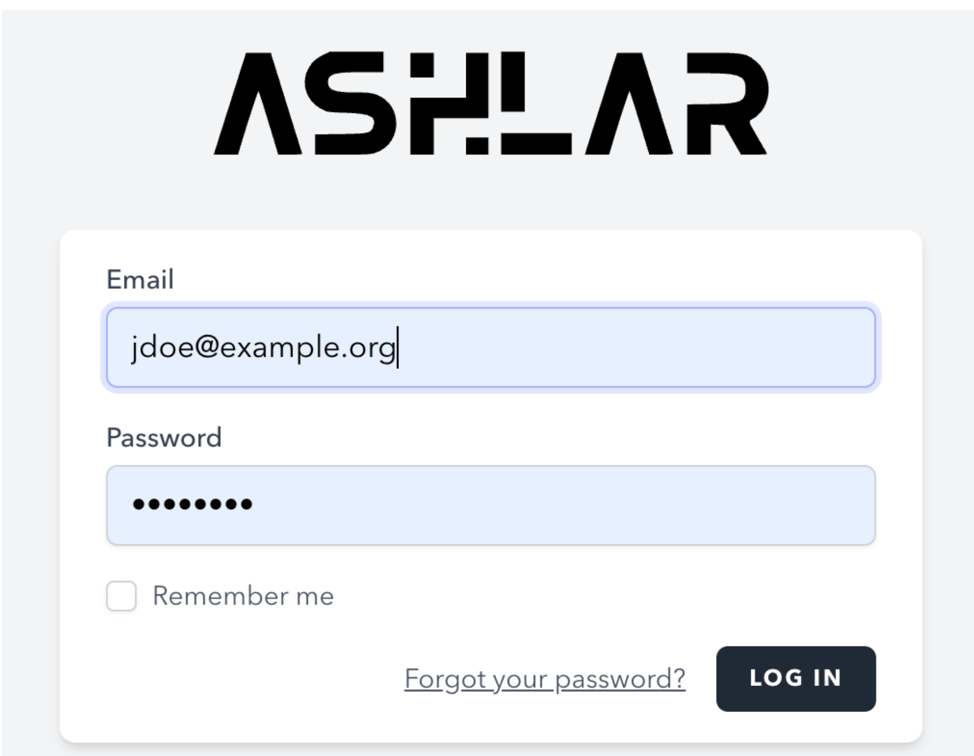
2. Fill out the registration form. Your **Team Name** should be the name of your organization. Note, a valid email address is required to receive notifications.



Sign into an Existing Account

1. Visit https://ashlar.app in your web browser

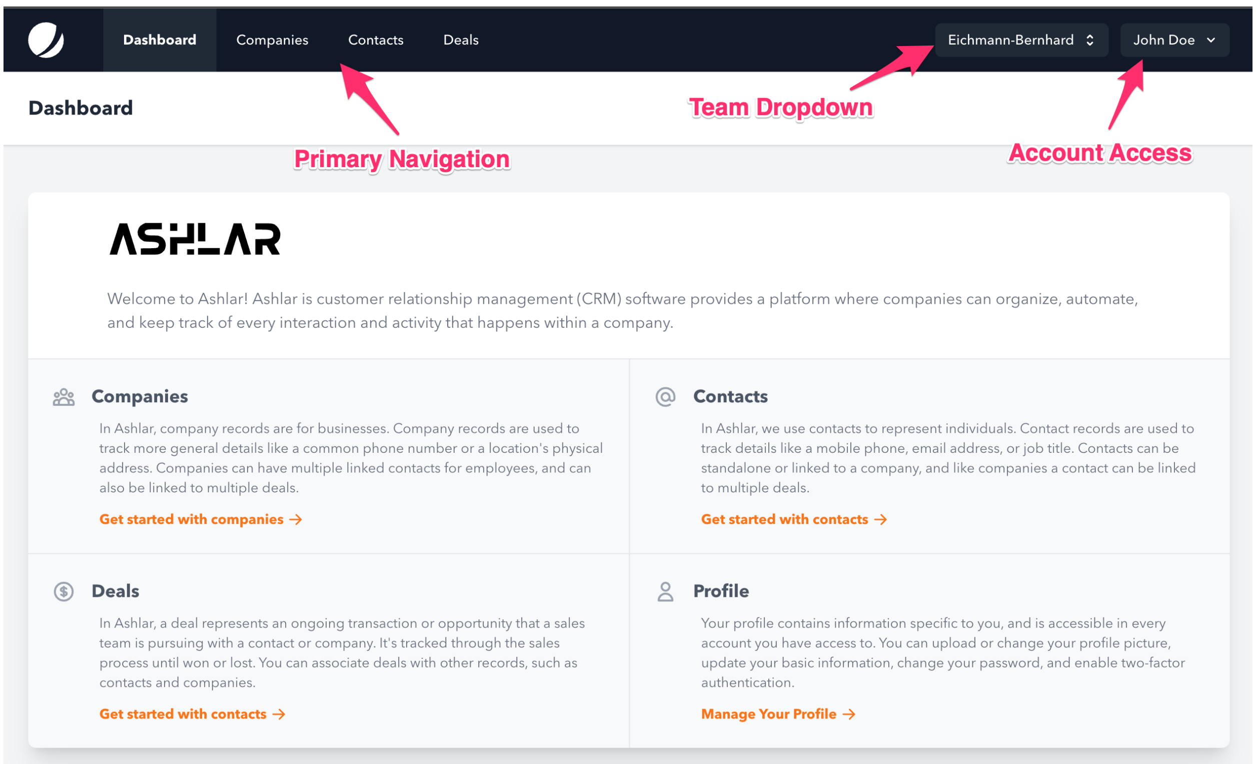
2. Enter the email address and password you used to register your account



Your Dashboard

After successfully registering or signing into your account, you will be redirected to your dashboard. From the dashboard, you can navigate the application using the primary navigation as shown in the image below, access your team settings, and manage your account.

The dashboard also gives you a brief explanation of the different areas of the application to help you understand how everything fits together.

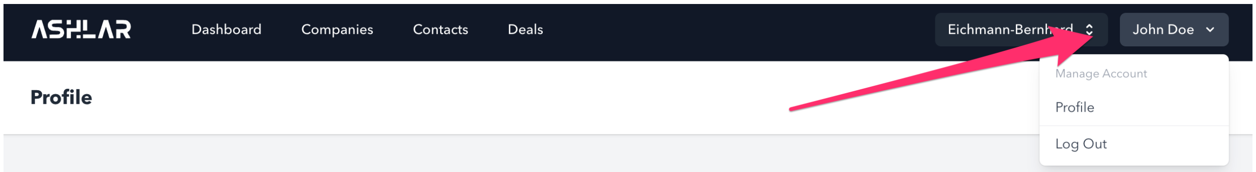


Managing Your Profile

Your profile menu will allow you to update your basic profile setup 2-factor authentication, change your password, and view active and recent sessions. This guide is for users to manage and update their own profiles.

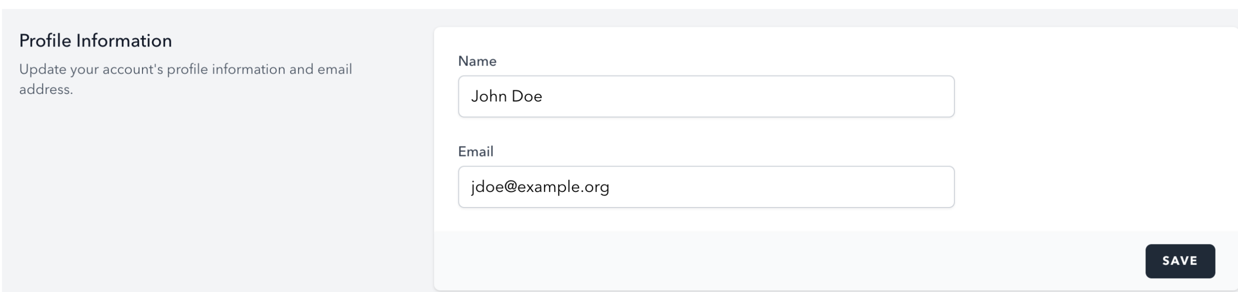
Accessing Your Account Tools

You can access your profile and account information on any page by clicking your name in the top right of the screen.



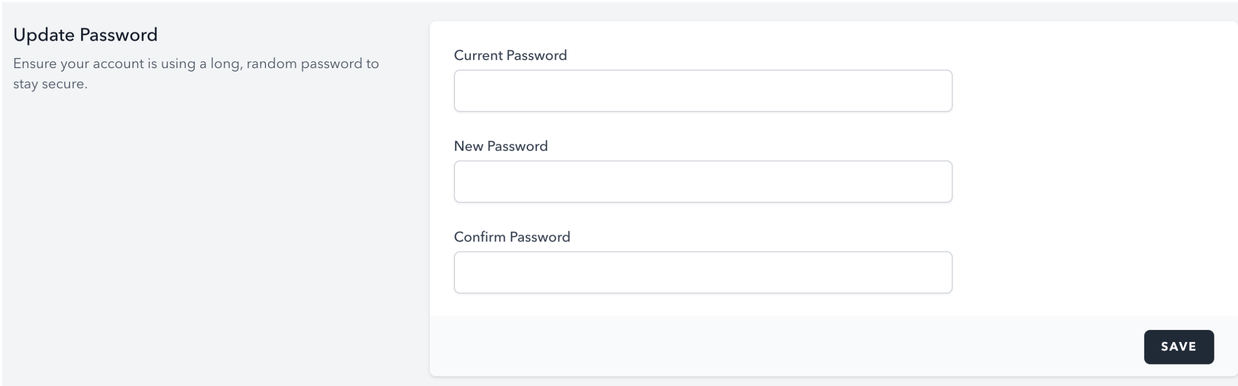
Update Your Profile Information

Access the **Account Menu and** click **Profile,** where you can fill out your name and email address. Your email address also serves as your login id. Once you are satisfied with the information, click the **Save** button.



Update Your Password

You can update your password from the same **Profile** page. Your password should be a minimum of eight (8) characters in length.



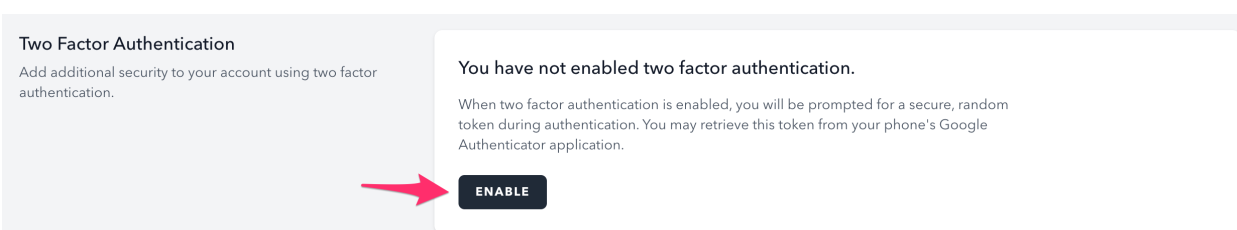
Enable Two-Factor Authentication

When two factor authentication is enabled, you will be prompted for a secure, random token during authentication. You may retrieve this token from your phone's Google Authenticator application.

1. Before enabling two-factor authentication, you will need to have the Google Authenticator app on your mobile device. This is a free app provided by Google.
    a. For iOS users, search the App Store for "Google Authenticator", or visit https://apps.apple.com/us/app/google-authenticator/id388497605 on your mobile device.

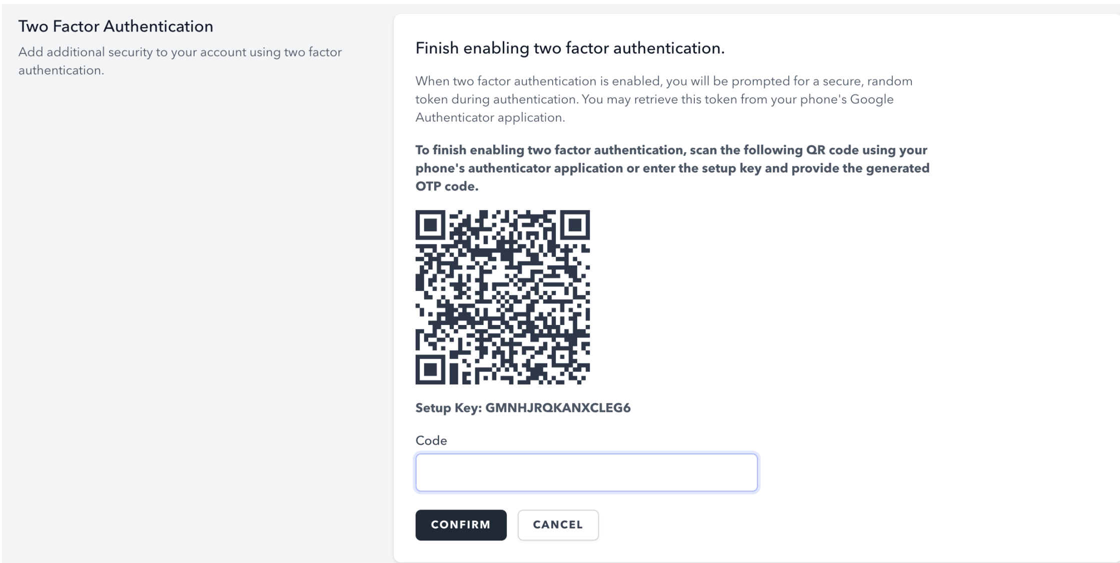
    b. For Android users, search. the Google Play Store for "Google Authenticator, or visit https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en_US&gl=US on your mobile device.

2. Back in Ashlar, from the **Profile** page, scroll down **to Two Factor Authentication** and click **Enable**.



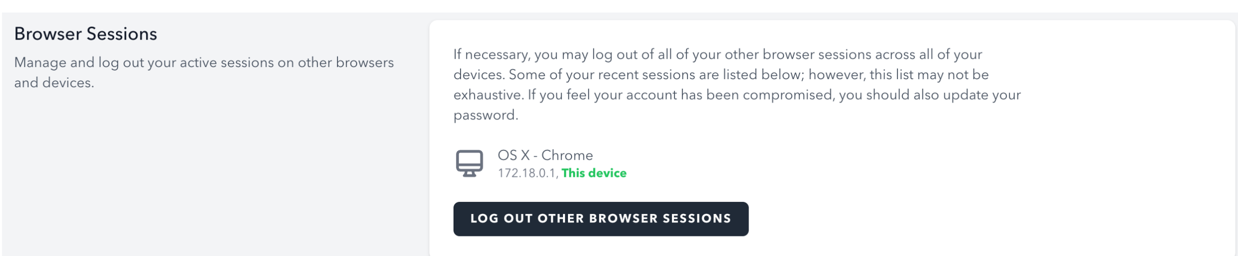
3. Confirm your account by entering your password

4. To finish enabling two factor authentication, scan the provided QR code using the Google Authentication app you installed on your mobile device in **Step 1,** and enter the code displayed on your phone.



Manage Browser Sessions

If necessary, you may log out of all your other browser sessions across all of your devices. Some of your recent sessions are listed below; however, the provided list may not be exhaustive. If you feel your account has been compromised, you should also update your password.

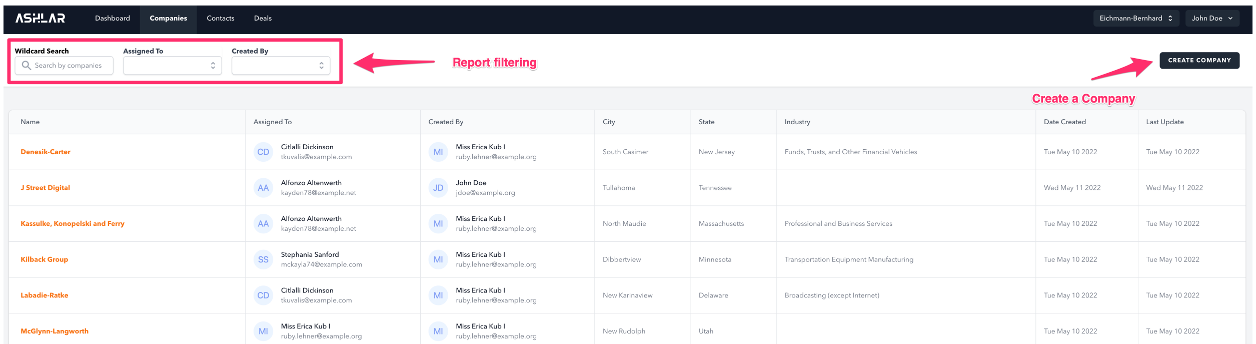


Managing Companies

In Ashlar, company records represent businesses and organizations. Companies are used to track general details like a common phone number or a location's physical address. Companies can have multiple linked contacts for employees and can also be linked to multiple deals. Let's follow the steps below to add your first company.

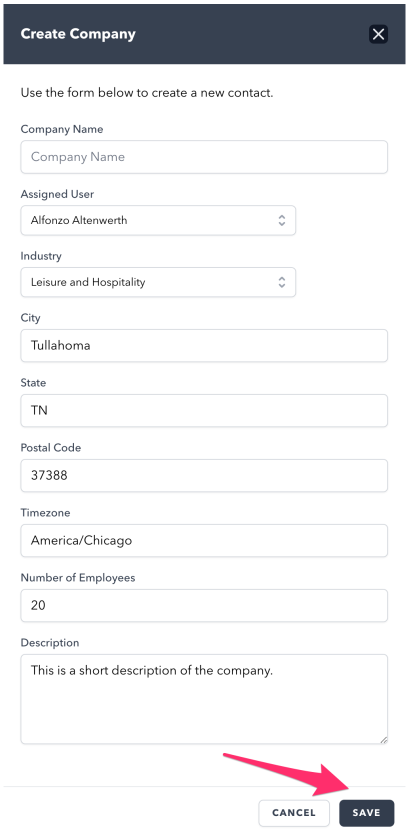
Creating a Company

1. From your dashboard, navigate to **Companies** using the **Primary Navigation**.
2. In the upper right, click "**Create Company**"

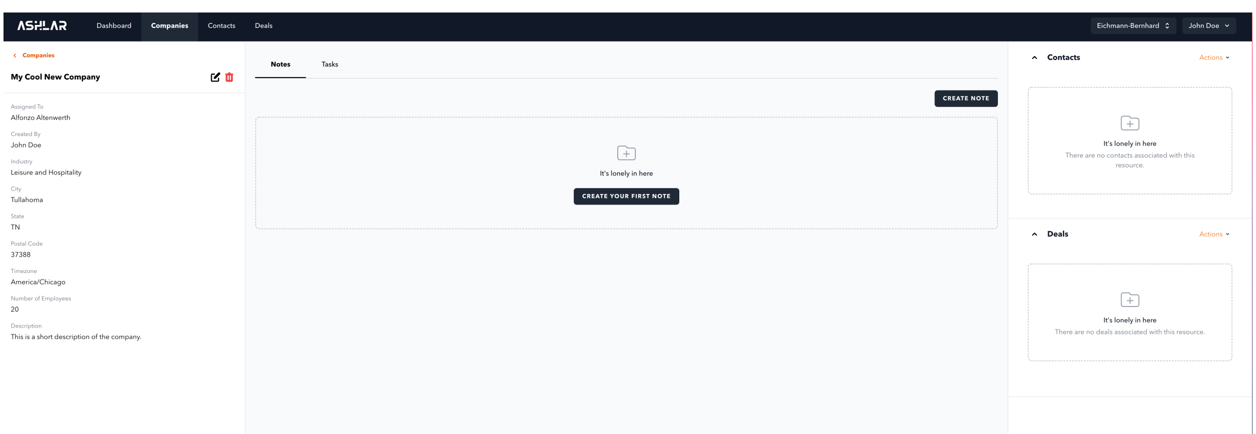


3. In the right panel, enter the **company information** into the provided fields. Note that only the **Company Name** field is required to save your new company.

4. Once you have filled in the company information, click **Save** located at the bottom right of the screen.



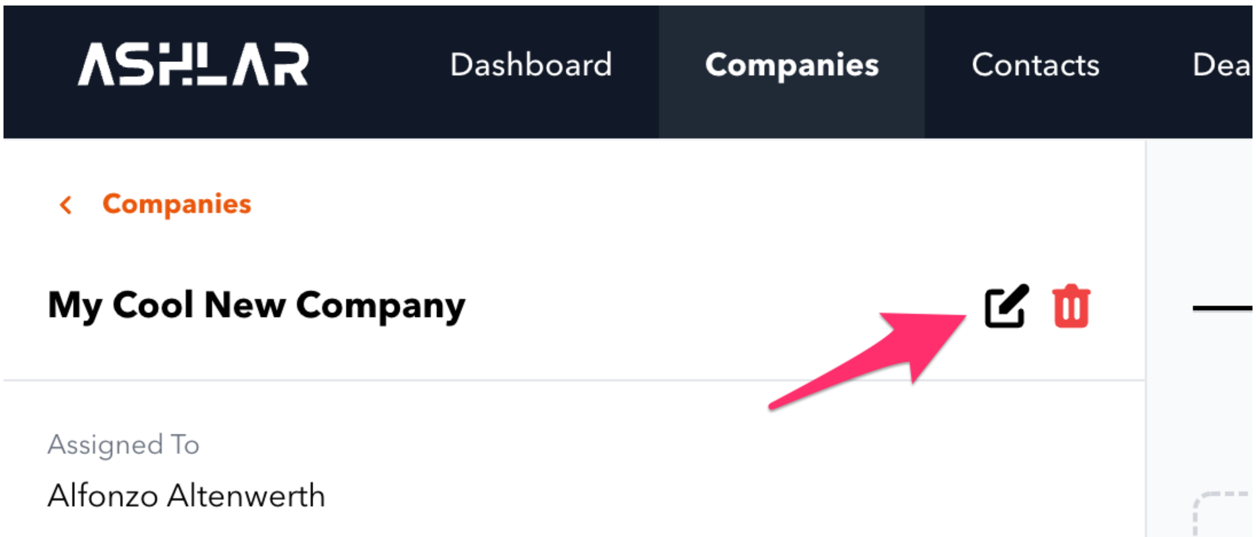
Once your new company is saved, you will be redirected to the **Company Dashboard** as illustrated in the figure below.



Updating a Company

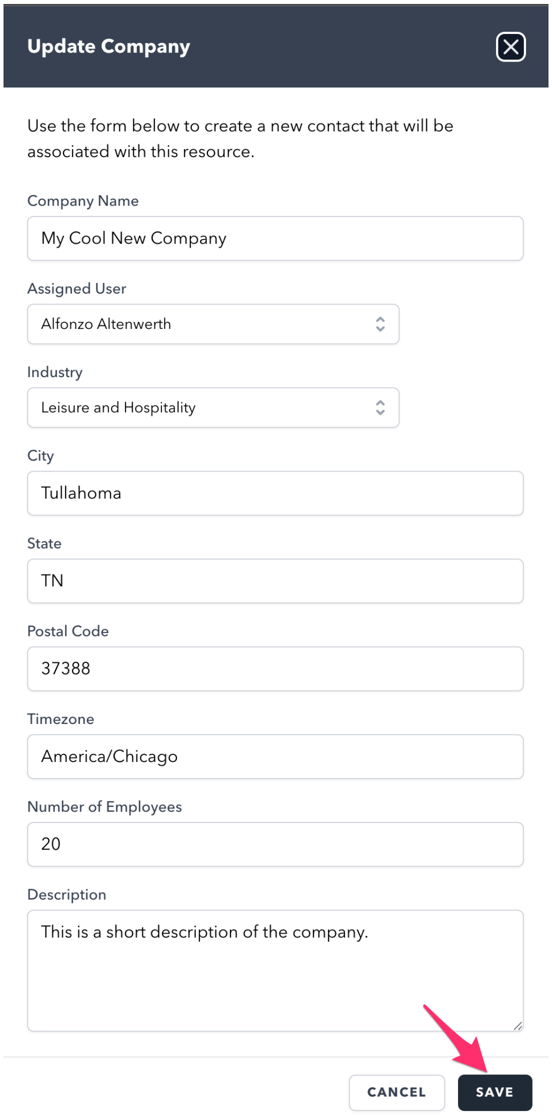
There will be times that you need to update information about a company. The flow for updating a company is very similar to creating a new one.

1. Click the **Edit** icon located in the top left of the **Company Dashboard** as shown in the figure below:

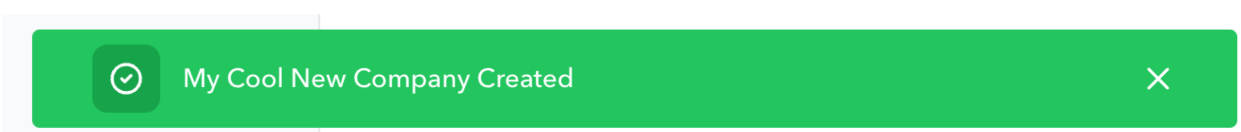


2. In the right panel, enter the **company information** you wish to update into the provided fields. Note that only the **Company Name** field is required to save your new company.

3. Once you have made changes in the company information, click **Save** located at the bottom right of the screen.



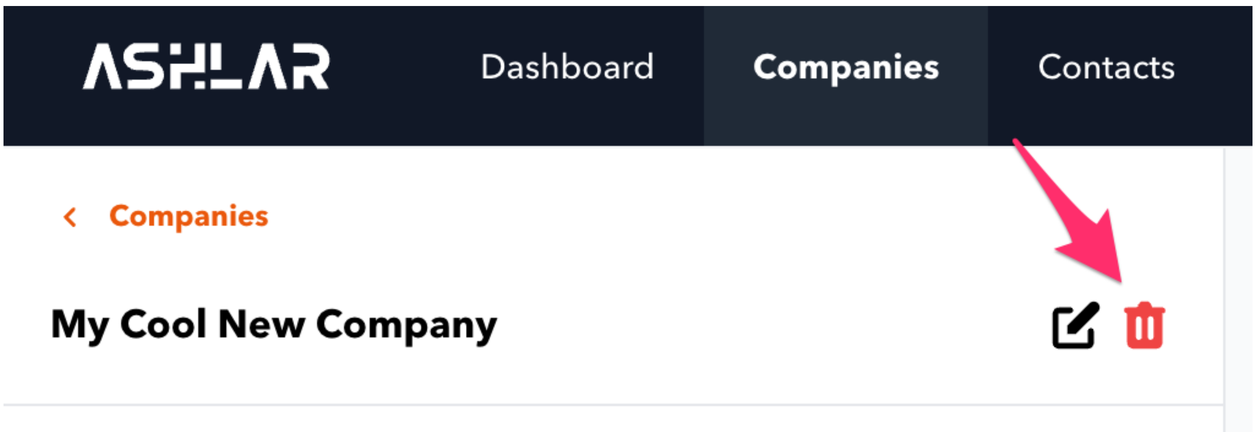
After clicking save, the right panel will close, and a green success message will be displayed in the lower right side of your screen. You will also be able to immediately see your changes on the left panel.



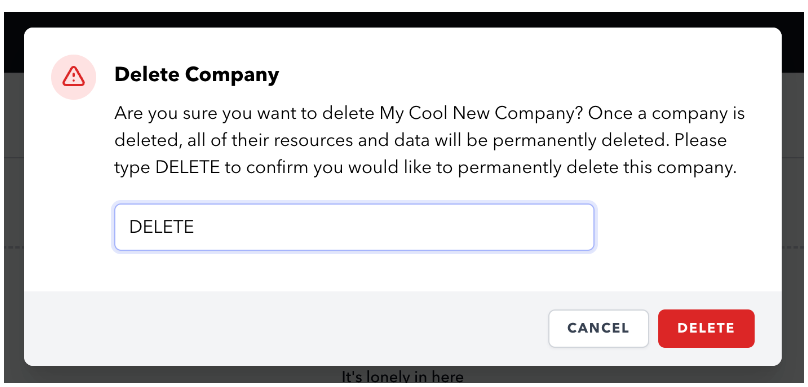
Deleting a Company

Sometimes you will no longer need a company saved to your team. To delete a customer:

1. Click the **trash can** icon located in the top left of the **Company Dashboard** as shown in the figure below:



2. A confirmation modal will appear on the screen asking you to make sure you really want to delete this customer. Deleting a customer will also delete any notes or tasks that are associated with this company.



3. If you are sure, you will need to type "**DELETE**" into the input field. This is case-sensitive and must be typed in all caps. Because this is irreversible, we want to make sure you really want to delete the company.

4. Once you have typed the word delete, you can click the **DELETE** button as shown in the image below:

5. After confirming that you want to delete the company, the company will be deleted, and you will be redirected back to the **Company List** view. You will see a green success message in the lower right-hand corner as a confirmation.

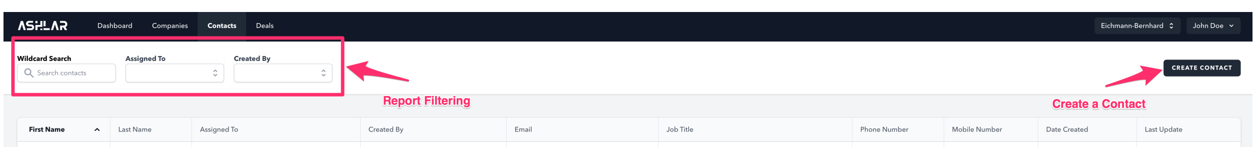
Managing Contacts

In Ashlar, we use contacts to represent individuals. Contact records are used to track details like a mobile phone, email address, or job title. Contacts can be standalone or linked to a company, and like companies a contact can be linked to multiple deals.

Creating a Contact

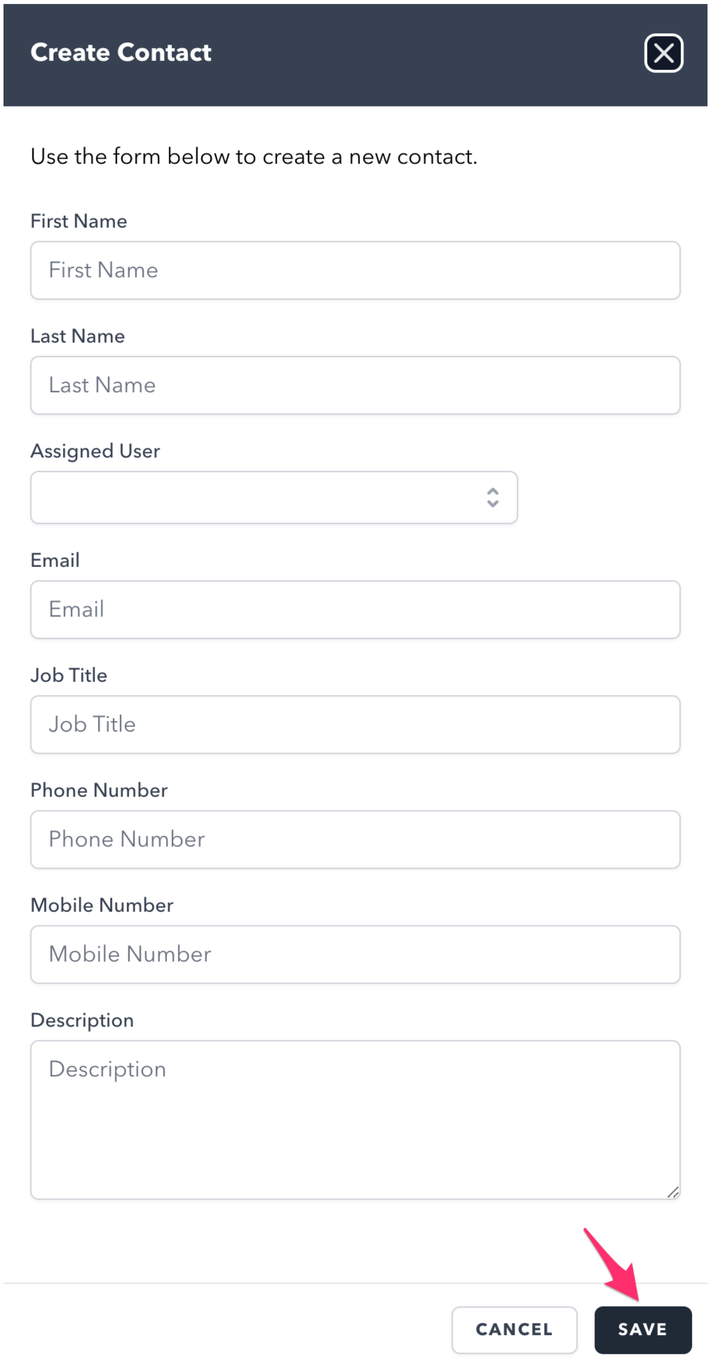
1. From your dashboard, navigate to **Contacts** using the **Primary Navigation** located at the top of any screen.

2. From the **Contacts List View** page, click "**Create Contact**" located at the top right of your screen.

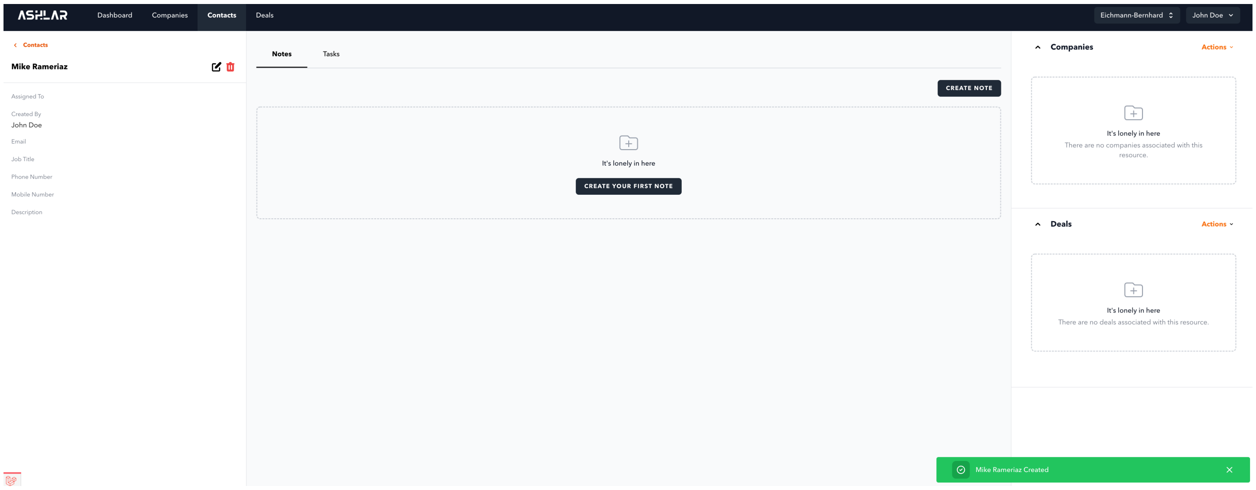


3. In the right panel, enter the **contact information** into the provided fields. Note that only the **contact's first and last name** fields are required to save your new contact.

4. Once you have filled in the contact information, click **Save** located at the bottom right of the screen.



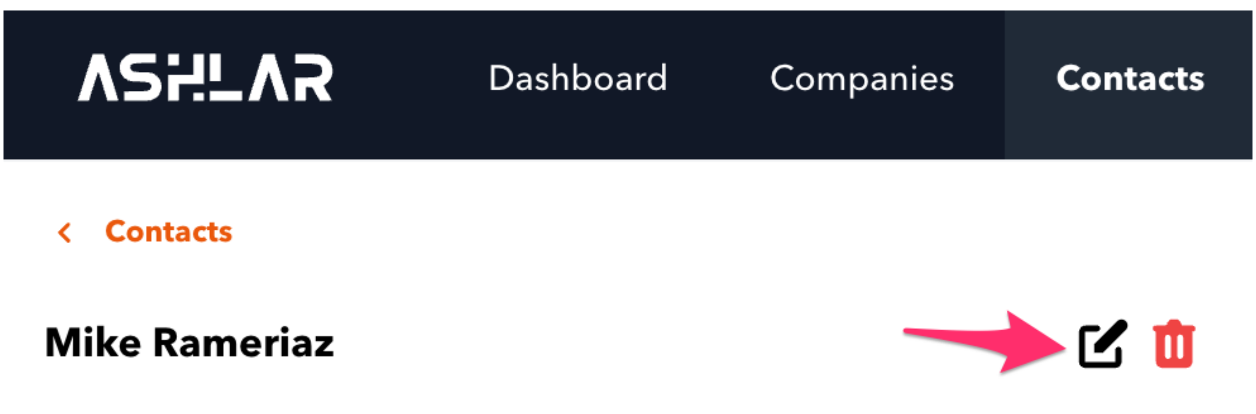
Once your new contact is saved, you will be redirected to the **Contact View** as illustrated in the figure below.



Updating a Contact

There will be times that you need to update information about a contact. The flow for updating a contact is very similar to creating a new one.

1. Click the **Edit** icon located in the top left of the **Contact Dashboard** as shown in the figure below:



2. In the right panel, enter the **contact information** you wish to update into the provided fields. Note that only the **contact's first and last name** fields are required to save your new contact.

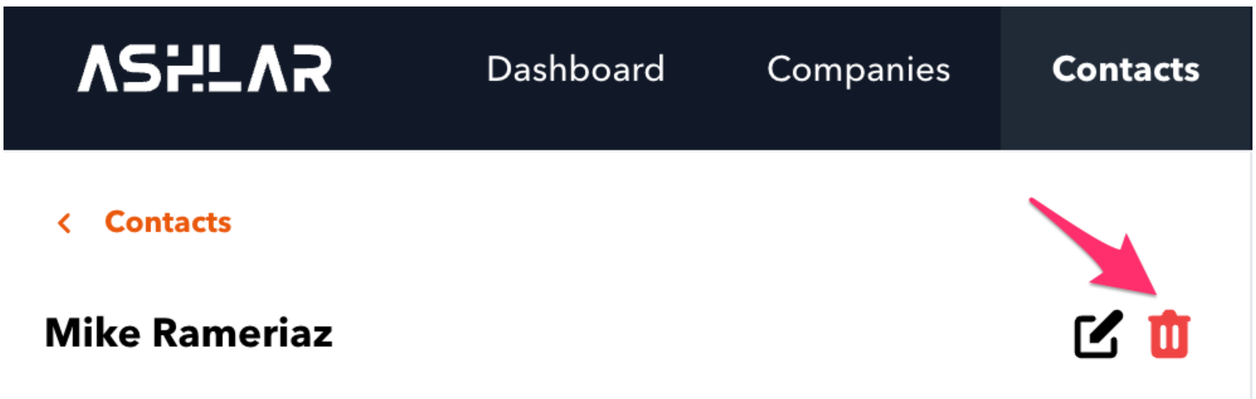
3. Once you have made changes in the contact information, click **Save** located at the bottom right of the screen.

After clicking save, the right panel will close, and a green success message will be displayed in the lower right side of your screen. You will also be able to immediately see your changes on the left panel.

Deleting a Contact

Sometimes you will no longer need a contact. To delete a contact:

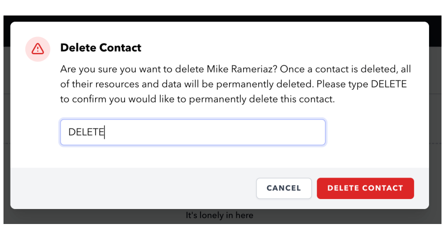
1. Click the **trash can** icon located in the top left of the **Contact Dashboard** as shown in the figure below:



2. A confirmation modal will appear on the screen asking you to make sure you really want to delete this contact. Deleting a contact will also delete any notes or tasks that are associated with the contact.

3. If you are sure, you will need to type "**DELETE**" into the input field. This is case-sensitive and must be typed in all caps. Because this is irreversible, we want to make sure you really want to delete the contact.

4. Once you have typed the word delete, you can click the **DELETE** button as shown in the image below:



5. After confirming that you want to delete the contact, the contact will be deleted, and you will be redirected back to the **Contact List** view. You will see a green

success message in the lower right-hand corner as a confirmation.

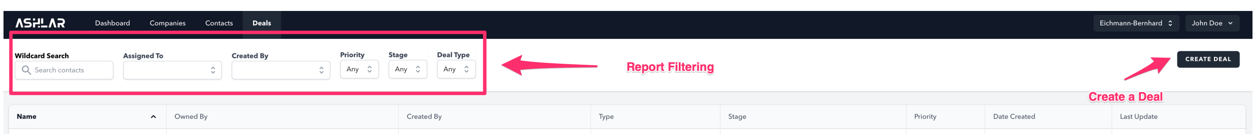
Managing Deals

In Ashlar, a deal represents an ongoing transaction or opportunity that a sales team is pursuing with a contact or company. It's tracked through the sales process until won or lost. You can associate deals with other records, such as contacts and companies.

Creating a Deal

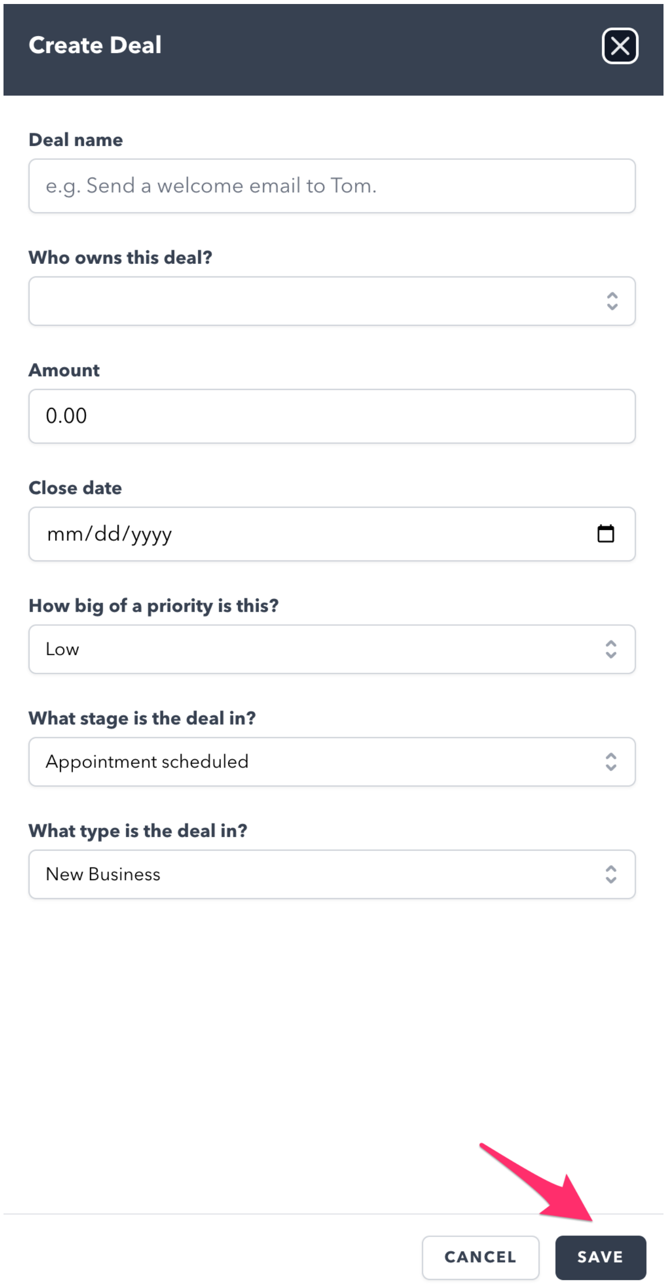
1. From your dashboard, navigate to **Deals** using the **Primary Navigation** located at the top of any screen.

2. From the **Deals List View** page, click "**Create Deal**" located at the top right of your screen.

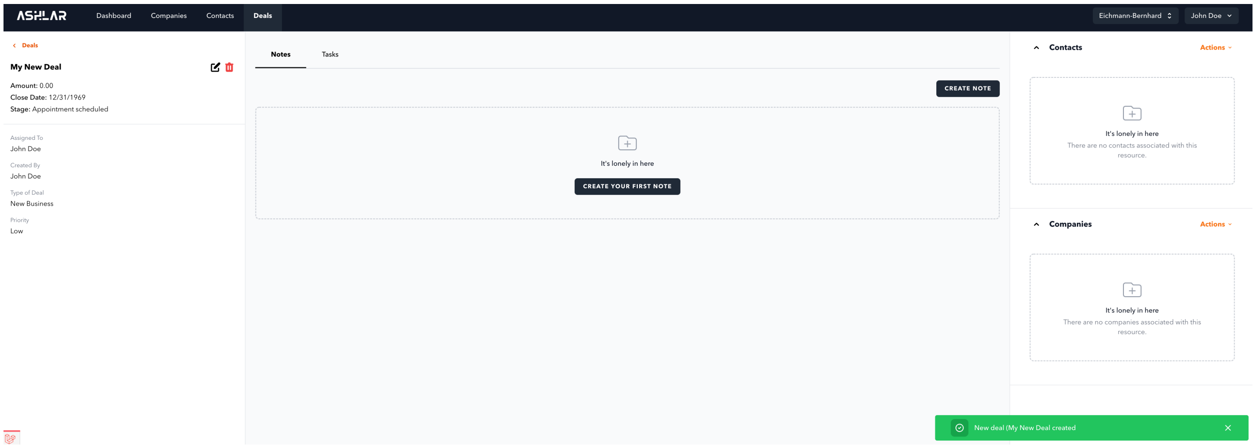


3. In the right panel, enter the **deal information** into the provided fields. Note that only the **deal's name** field is required to save your new deal.

4. After you have filled in the contact information, click **Save** located at the bottom right of the screen.



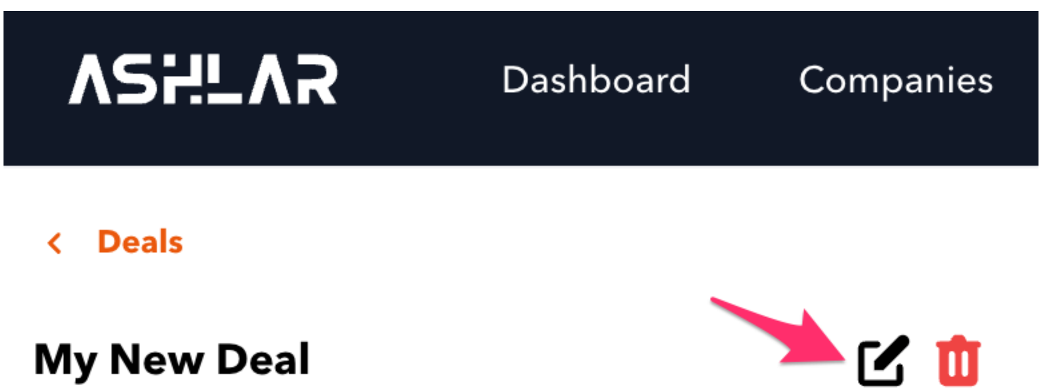
Once your new deal is saved, you will be redirected to the **Deal View** as illustrated in the figure below.



Updating a Deal

There will be times that you need to update information about a deal. The flow for updating a deal is very similar to creating a new one.

1. Click the **Edit** icon located in the top left of the **Deal Dashboard** as shown in the figure below:



2. In the right panel, enter the **deal information** you wish to update into the provided fields. Note that only the **deal's name** field is required to save your new deal.

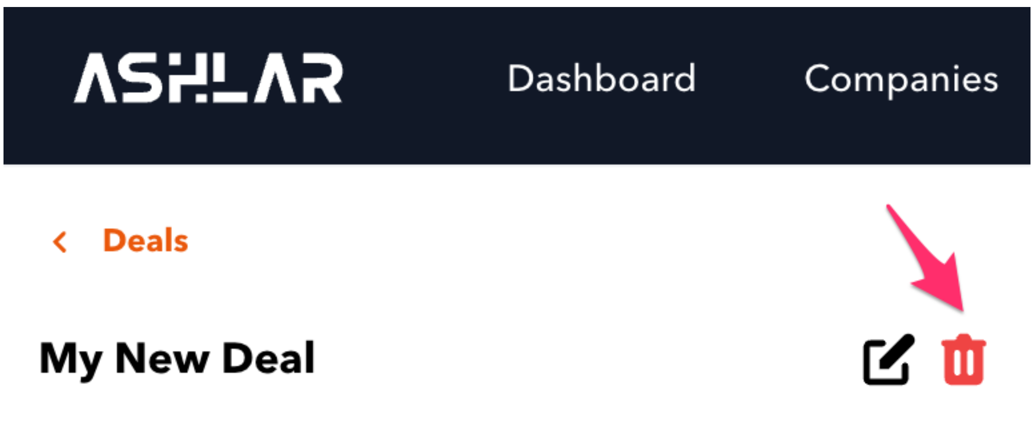
3. Once you have made changes in the deal's information, click **Save** located at the bottom right of the screen.

After clicking save, the right panel will close, and a green success message will be displayed in the lower right side of your screen. You will also be able to immediately see your changes on the left panel.

Deleting a Deal

Sometimes you will no longer need a deal. To delete a deal:

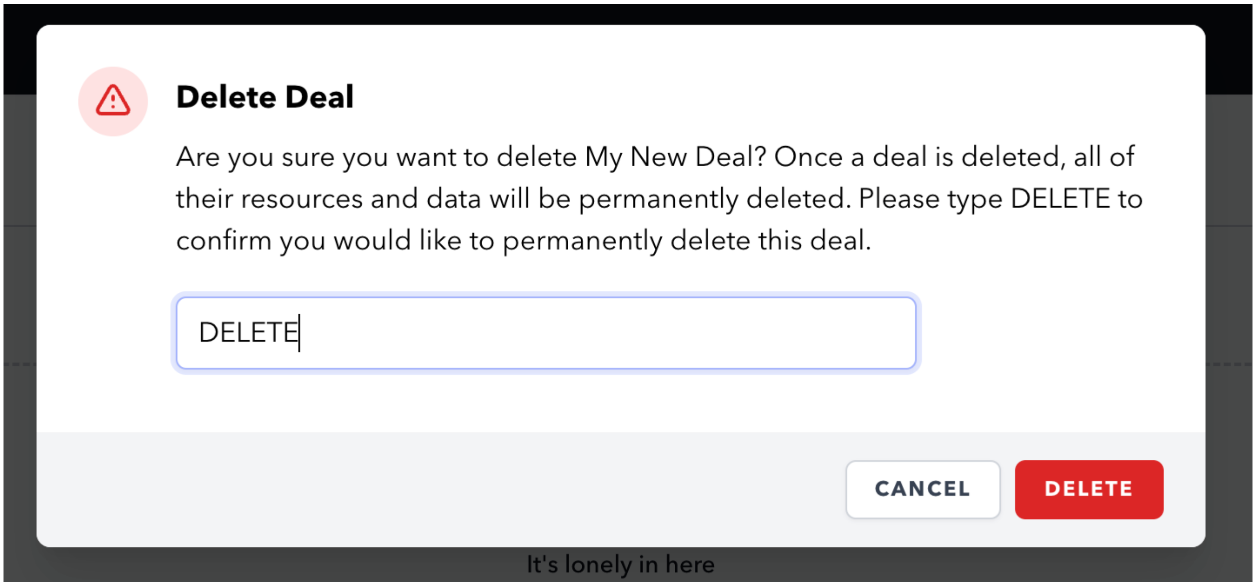
1. Click the **trash can** icon located in the top left of the **Deal Dashboard** as shown in the figure below:



2. A confirmation modal will appear on the screen asking you to make sure you really want to delete this deal. Deleting a deal will also delete any notes or tasks that are associated with the deal.

3. If you are sure, you will need to type "**DELETE**" into the input field. This is case-sensitive and must be typed in all caps. Because this is irreversible, we want to make sure you really want to delete the deal.

4. Once you have typed the word delete, you can click the **DELETE** button as shown in the image below:



5. After confirming that you want to delete the contact, the contact will be deleted, and you will be redirected back to the **Deal List** view. You will see a green success message in the lower right-hand corner as a confirmation.

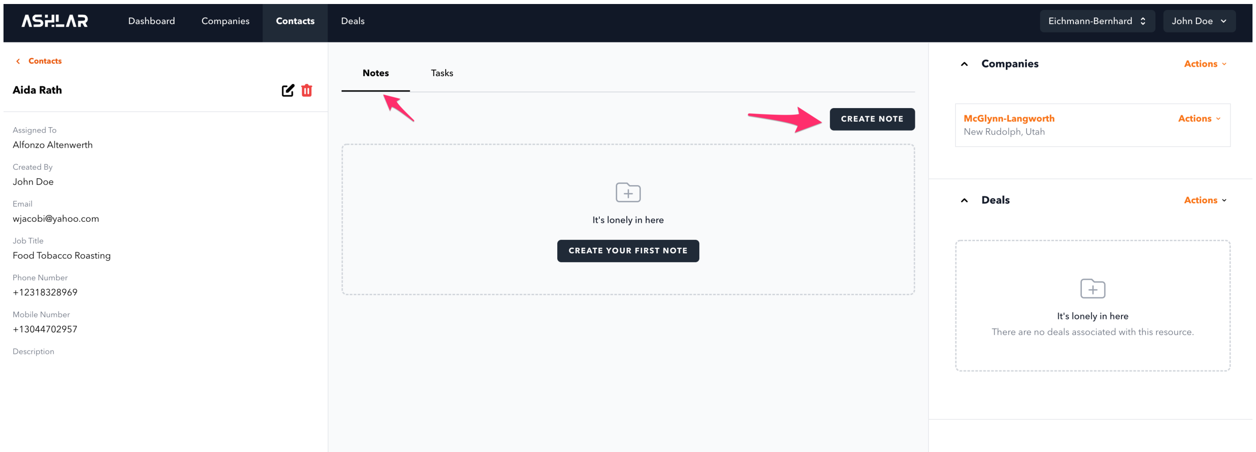
Using Notes

Notes are great way to update and log updates and important information on a contact, company, and/or deal in Ashlar. The notes functionality works the same across all the supported modules.

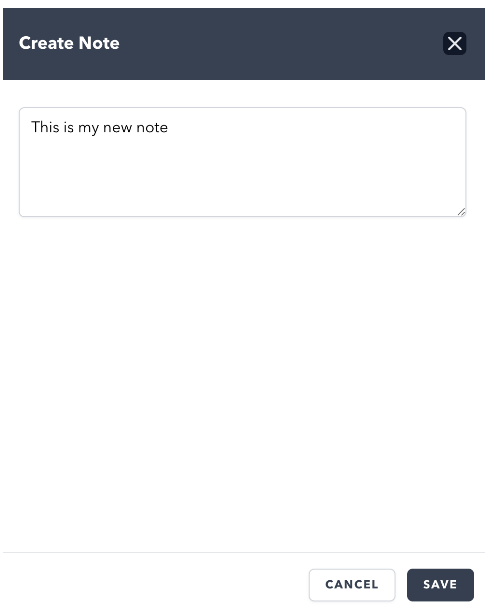
Create a Note

1. Navigate to the contact, company, deal, or ticket you'd like to log a note on.

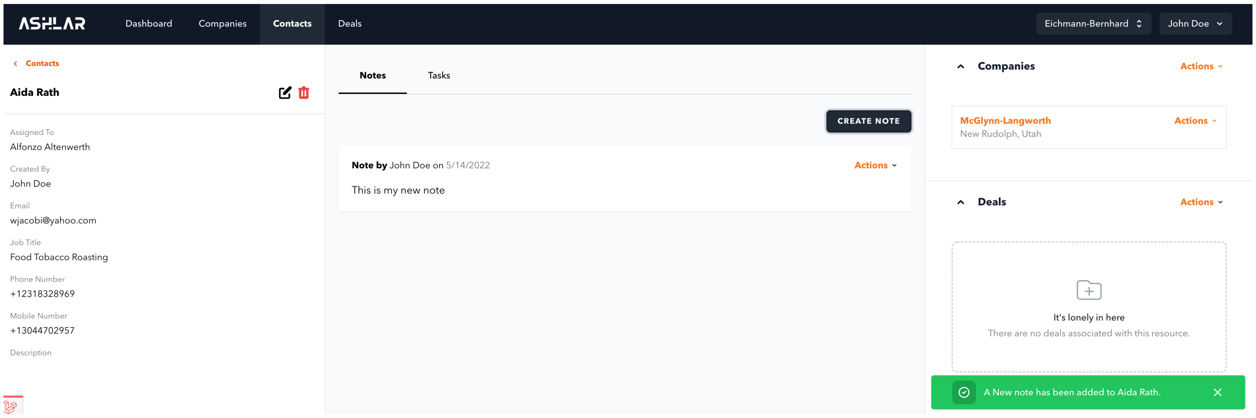
2. Click on the **Notes tab** and click the **Create Note** button located in the top right of the middle panel of the screen.



3. Type the note you would like to leave and click **Save** found in the lower right of the **Create Note** panel.

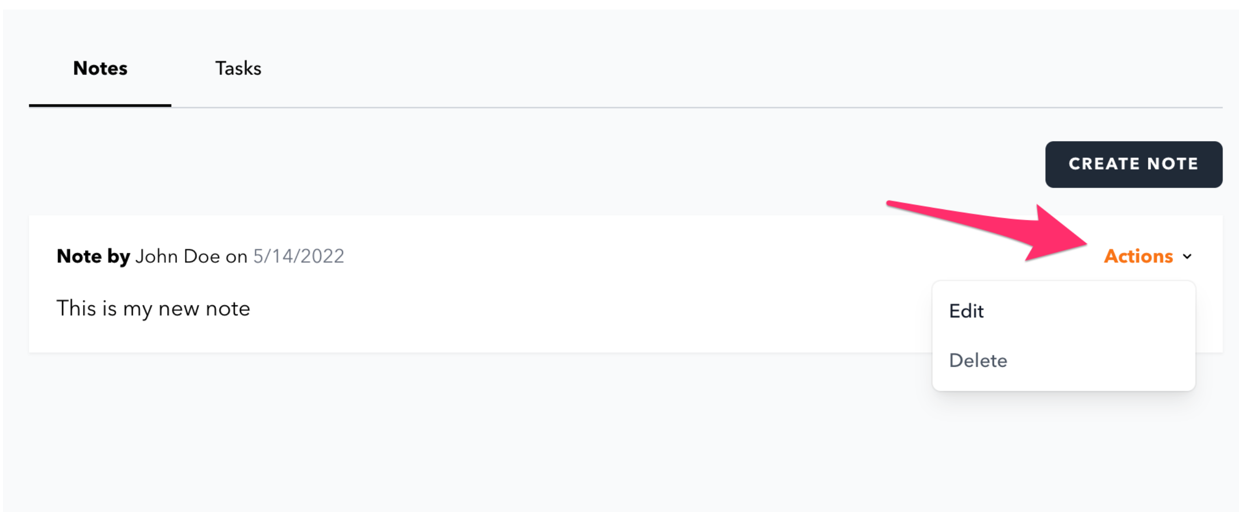


4. Once created, your new note will appear in the middle panel of your screen.



Update a Note

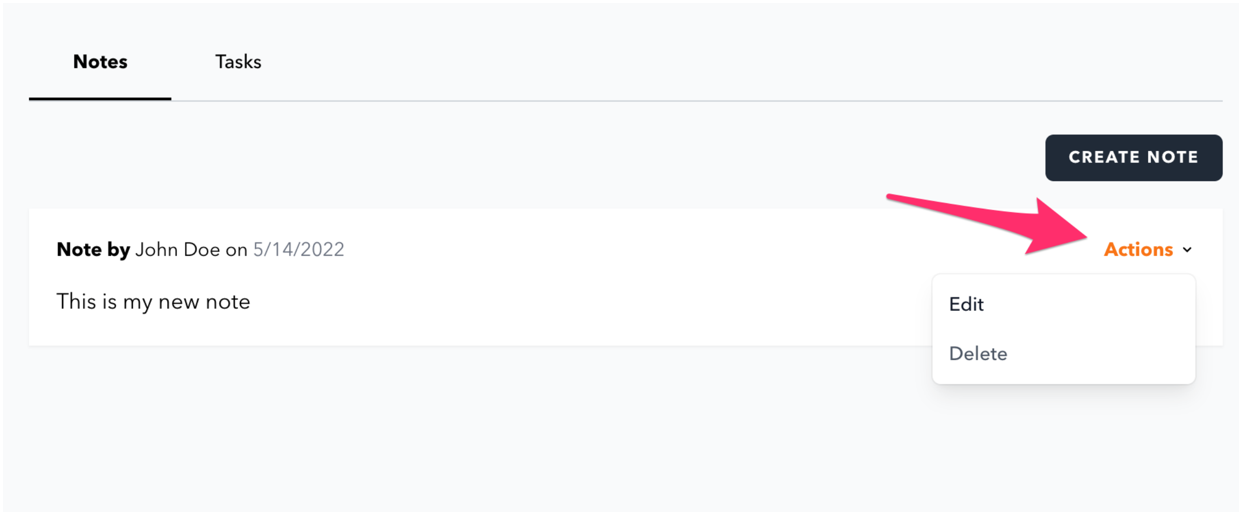
1. Locate the note you would like to edit and click on the **Actions** dropdown located on the right of the note panel and select **Edit**.



2. Make your changes and click the **Save** button found in the lower right of the **Update Note** panel.

Delete a Note

1. Locate the note you would like to edit and click on the **Actions** dropdown located on the right of the note panel and select **Delete**.



2. A confirmation modal will be displayed that asks if you are sure you want to delete the selected note.

3. Click **Cancel** if you no longer wish to delete the note, otherwise click **Delete**
4. If you chose to delete the note, a confirmation will be displayed in the lower right-hand side of the screen.

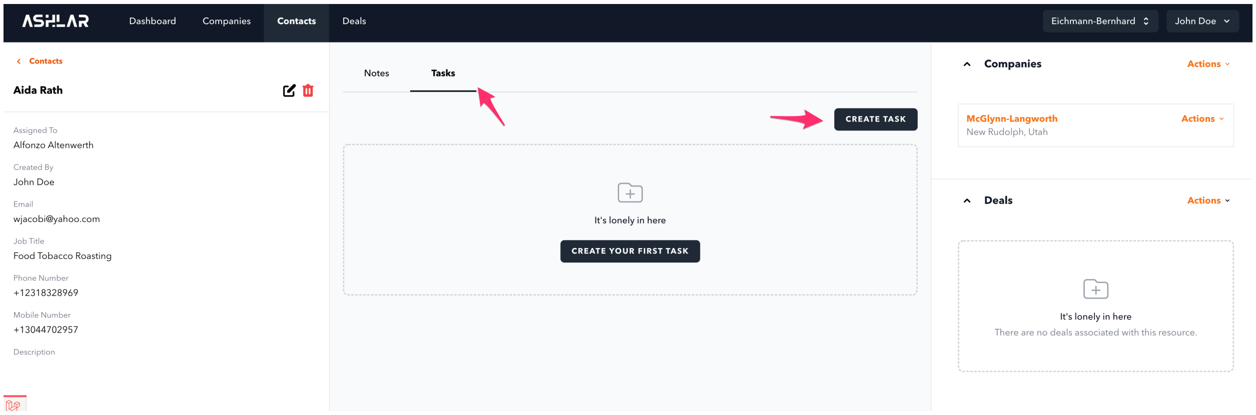
Using Tasks

Tasks are a great way to keep track of your to-do lists in Ashlar. Like notes, tasks can be associated with companies, contacts, and/or deals.

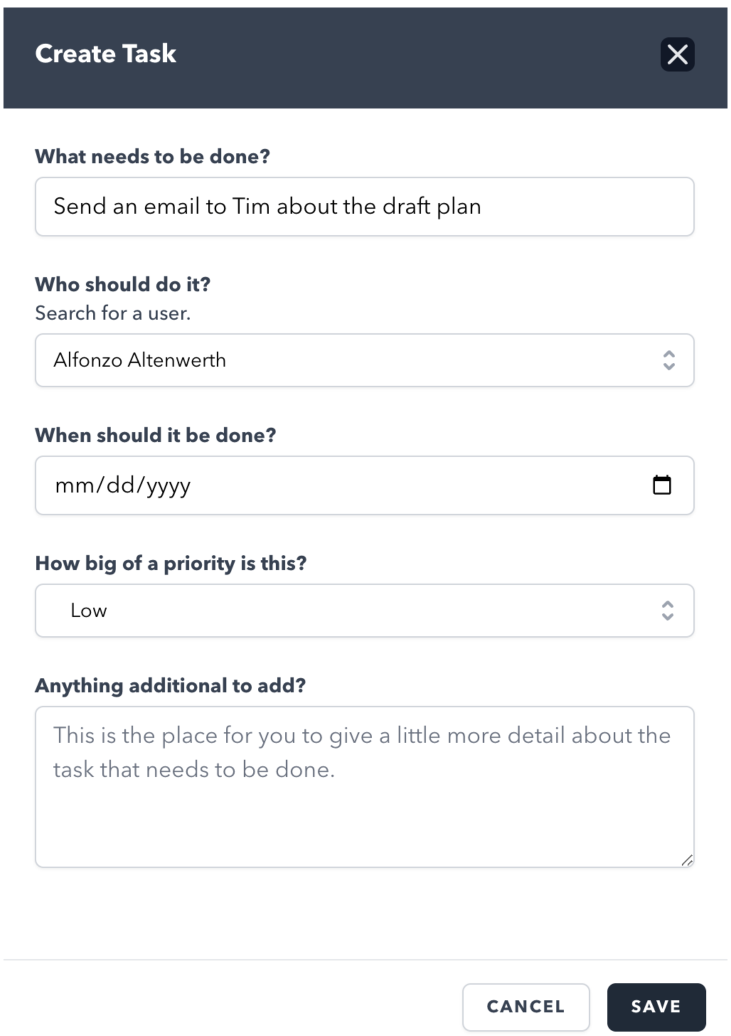
Create a Task

1. Navigate to the contact, company, deal, or ticket you'd for which you would like to create a task.

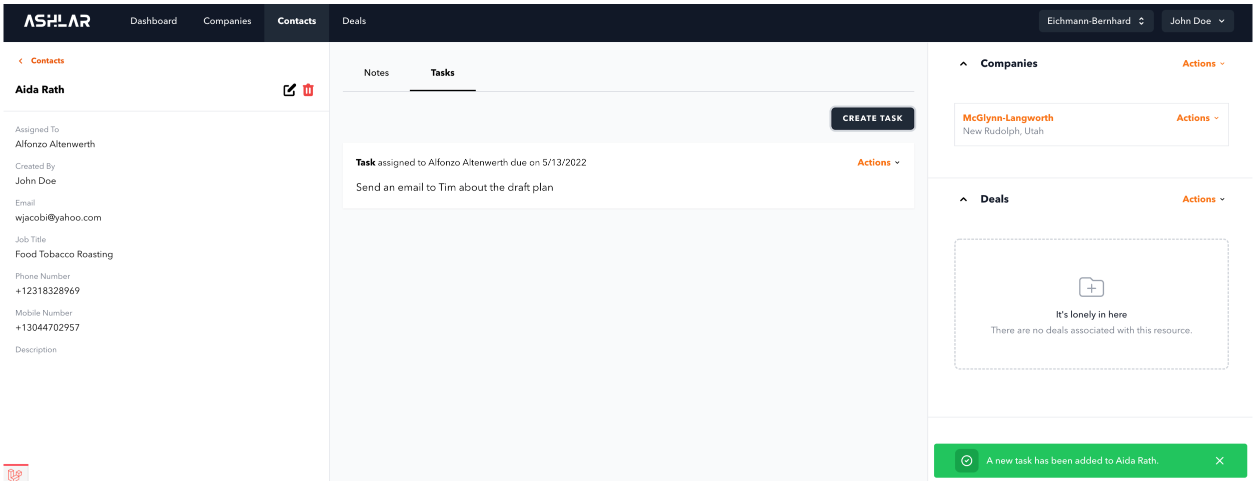
2. Click on the **Tasks tab** and click the **Create Task** button located in the top right of the middle panel of the screen.



3. Type the note you would like to leave and click **Save** found in the lower right of the **Create Note** panel. Only the task name is required. If no user is assigned, the task will automatically be assigned to you.

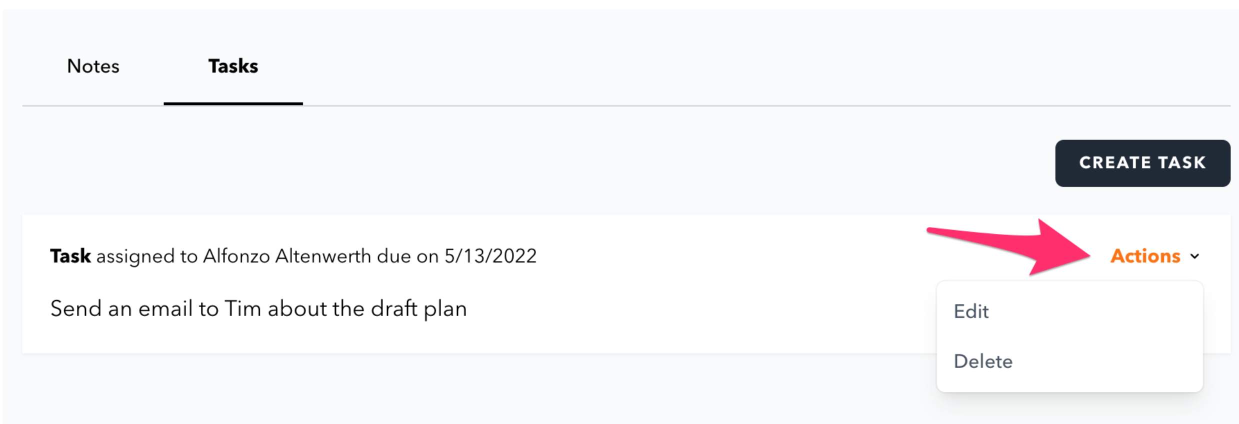


4. Once created, your new task will appear in the middle panel of your screen.



Update a Task

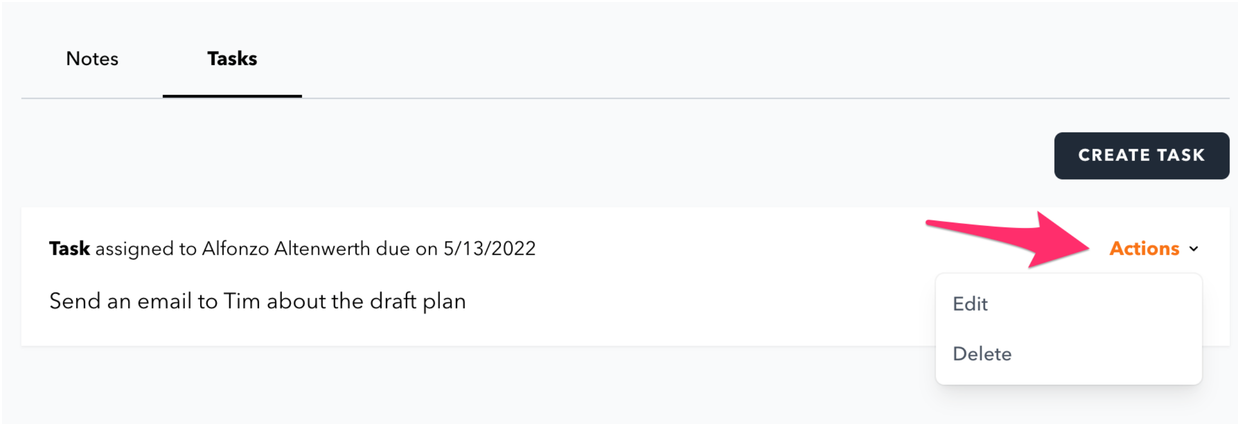
3. Locate the task you would like to edit and click on the **Actions** dropdown located on the right of the note panel and select **Edit**.



4. Make your changes and click the **Save** button found in the lower right of the **Update Note** panel.

Delete a Task

5. Locate the task you would like to edit and click on the **Actions** dropdown located on the right of the task panel and select **Delete**.



6. A confirmation modal will be displayed that asks if you are sure you want to delete the selected task.

7. Click **Cancel** if you no longer wish to delete the note, otherwise click **Delete**
8. If you chose to delete the task, a confirmation will be displayed in the lower right-hand side of the screen.

Linking Contacts, Companies, and Deals

One of the most powerful features in Ashlar, is the ability to associate contacts, companies, and deals. This helps you keep your information organized. The functionality for each works the same, so for this manual, we will only be covering linking and associating contacts.

Associations for companies, contacts, and deals can all be found on the right panel when viewing any one of those resources.

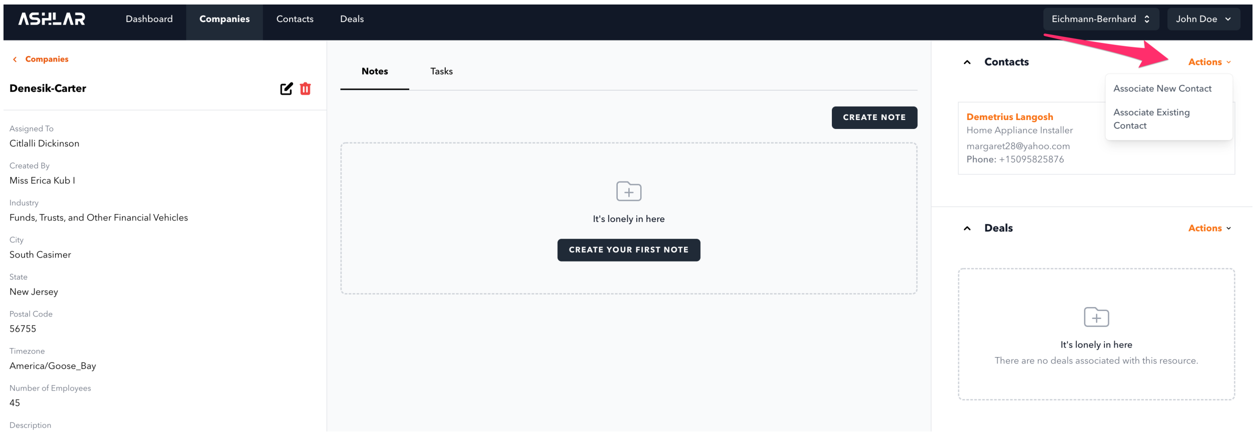
Note: *You will need to have at least one contact created to associate. You will also need to have at least one company or deal to work with.*

Associating Contacts with a Deal or Company

1. Use the navigation links at the top of the screen to select either **Companies** or **Deals** a list of resources.

2. Select a company or deal from the list.

3. Once selected, located the **Contacts** panel on the right side of the screen and click the action button. You can either choose to create a new contact to associate or associate an existing contact.



   a. If you select **Associate a New Contact**, a new panel will slide out with the same form we used to create a contact earlier in the documentation. Add your contact's information and click **Save**

   b. **If you select Associate and Existing Contact,** a new panel will slide out that will allow you to search for a contact that already exists. Once you have found the contact you would like to associate, click the **Save** button located at the bottom right of the panel.

4. After completing the previous step, you will see the contact record appear under the **Contacts** panel on the right side of the screen.

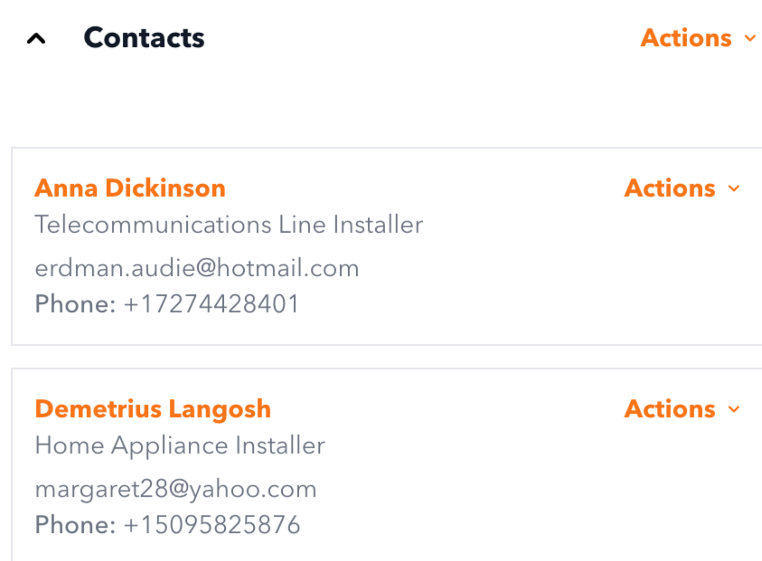
Associating Company with a Contact or Deal

1. Use the navigation links at the top of the screen to select either **Contacts** or **Deals** a list of resources.
2. Select a contact or deal from the displayed list
3. Once selected, located the **Companies** panel on the right side of the screen and click the action button. You can either choose to create a new company to associate or associate an existing company.
   a. If you select **Associate a New Company**, a new panel will slide out with the same form we used to create a company earlier in the documentation. Add

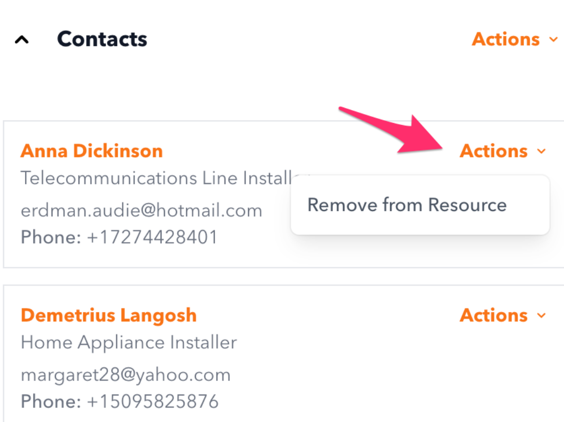
your company's information and click **Save**

b. **If you select Associate and Existing Company,** a new panel will slide out that will allow you to search for a company that already exists. Once you find the company you would like to associate by using the provided search box, click the **Save** button located at the bottom right of the panel.

4. After completing the previous step, you will see the company record appear under the **Companies** panel on the right side of the screen.



5. A contact can be dissociated with a deal or company by clicking the **Actions** dropdown menu.

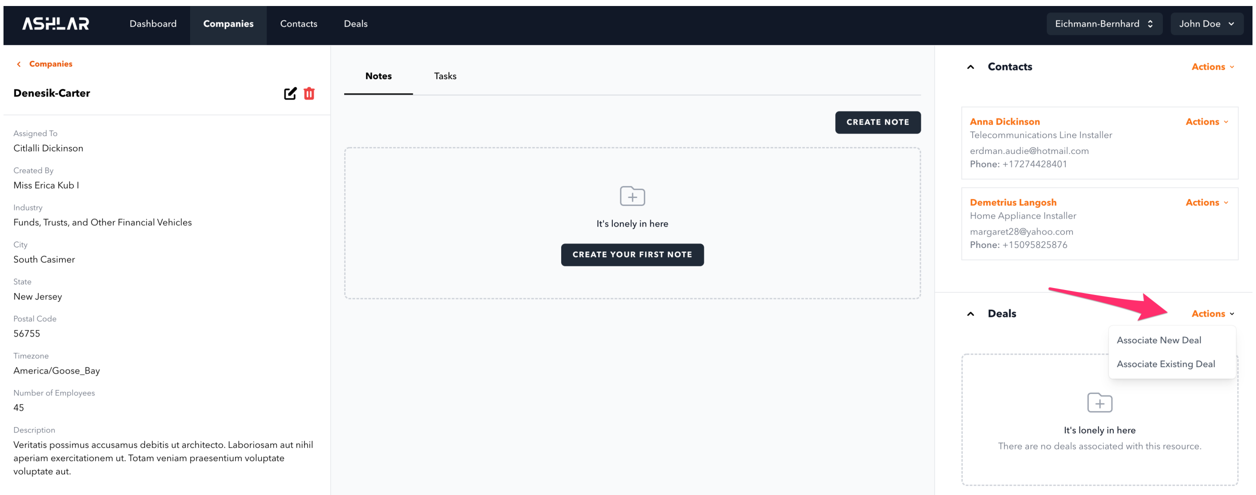


Associating Deal with a Contact or Company

1. Use the navigation links at the top of the screen to select either **Contacts** or **Companies** a list of resources.

2. Select a contact or company from the displayed list

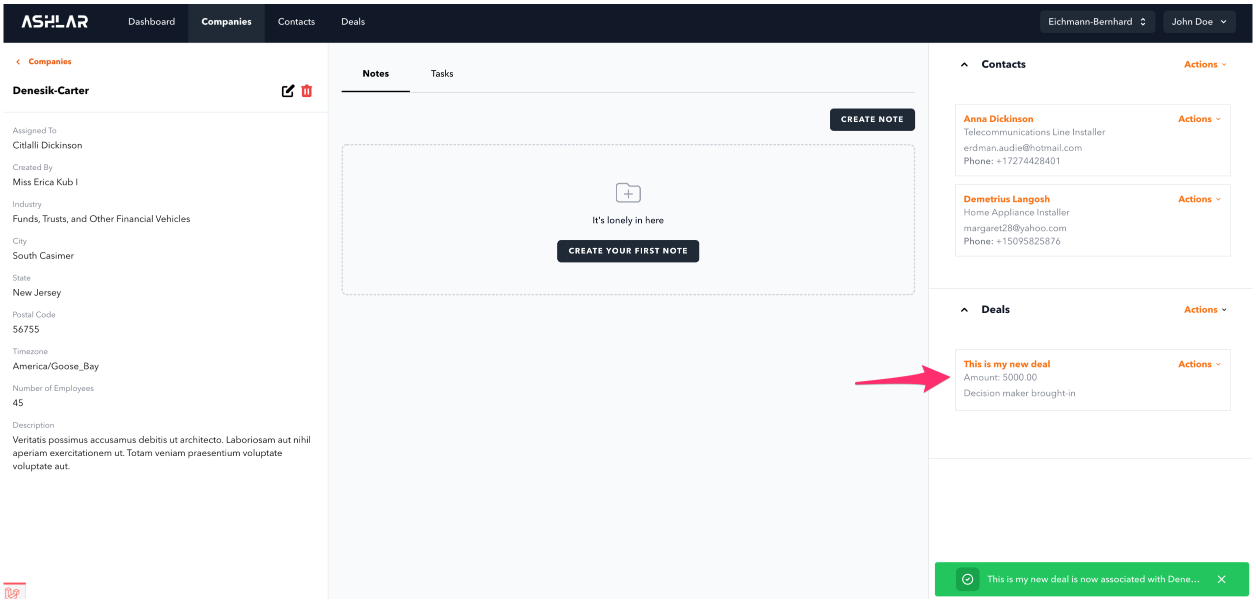
3. Once selected, located the **Deals** panel on the right side of the screen and click the action button. You can either choose to create a new deal to associate or associate an existing deal.



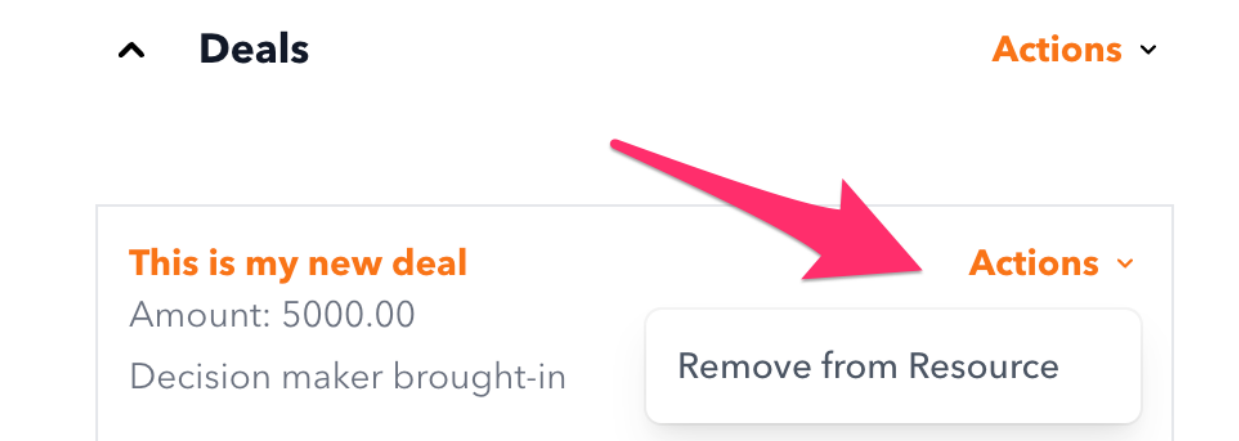
   a. If you select **Associate a New Deal**, a new panel will slide out with the same form we used to create a deal earlier in the documentation. Add your deal's information and click **Save**

   b. **If you select Associate and Existing Deal,** a new panel will slide out that will allow you to search for a deal that already exists. Once you find the deal you would like to associate by using the provided search box, click the **Save** button located at the bottom right of the panel.

4. After completing the previous step, you will see the deal record appear under the **Deals** panel on the right side of the screen.



5. A deal can be dissociated from a contact or company by clicking the **Actions** dropdown menu.

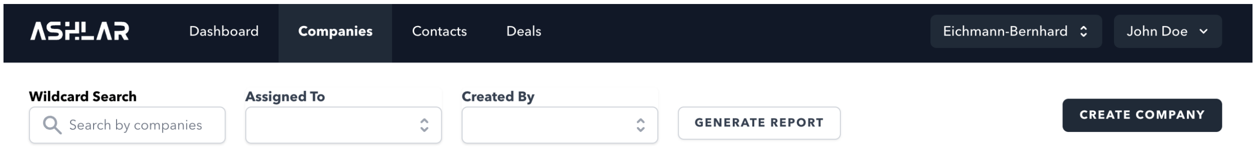


Reporting

Being able to aggregate the data you need to make decisions is an important part of choosing which CMS you will use. Ashlar makes this easy. Reporting is built into the dashboard view for each of the primary modules, companies, contacts, and deals.

The built-in filters allow you to generate reports by using a wildcard search, who a resource is assigned to or owned by who created the resources, and other filters that are resource based.

Company Reporting



The **Company** module allows you to filter and create a report using any combination of the following filters:

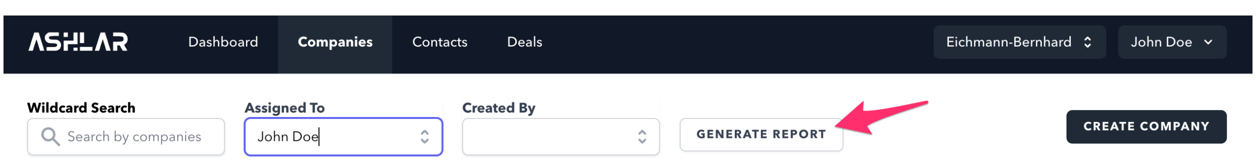
- The **Wildcard Search** allows you to free type and search for values in the name attribute column.

- The **Assigned To** filter allows you to quickly create a list of companies that are assigned to a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.

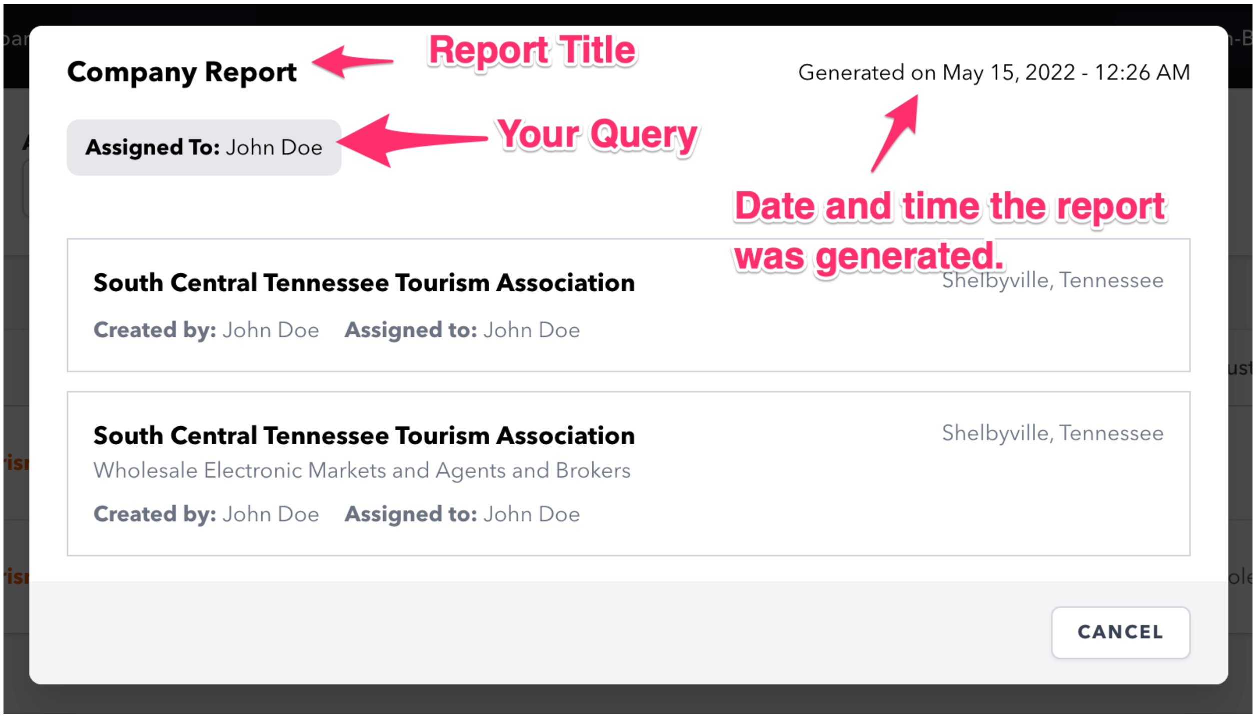
- The **Created By** filter, like the **Assigned To** filter, allows you to quickly create a list of companies that were created by a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- You can sort any column in ascending or descending by clicking on the column header.

Generating a Date/Time Stamped Company Report

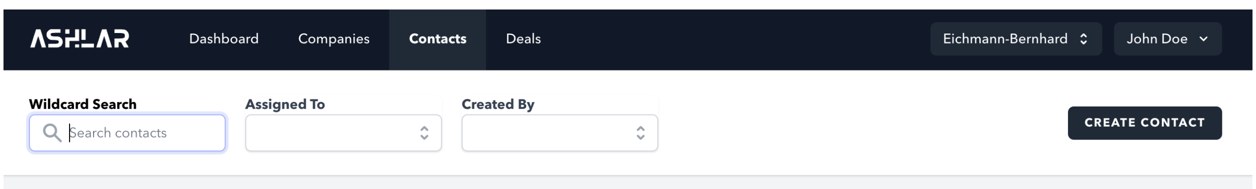
The **Companies** module includes a feature that allows you to generate a date and time stamped report the displays only the results of your query. This feature is currently only available in the **Companies** module.



Clicking the **Generate Report** will create the following report view:



Contact Reporting



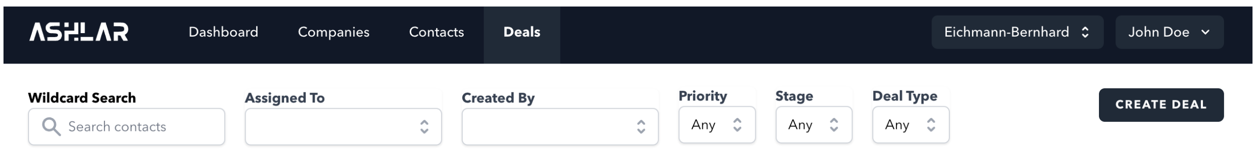
The **Contact** module allows you to filter and create a report using any combination of the following filters:

- The **Wildcard Search** allows you to free type and search for values in the **first name, last name, email, phone, and mobile number** attribute columns.

- The **Assigned To** filter allows you to quickly create a list of contacts that are assigned to a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.

- The **Created By** filter, like the **Assigned To** filter, allows you to quickly create a list of contacts that were created by a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- You can sort any column in ascending or descending by clicking on the column header.

Deal Reporting



The **Deal** module allows you to filter and create a report using any combination of the following filters:

- The **Wildcard Search** allows you to free type and search for values in the **Name** attribute column.

- The **Assigned To** filter allows you to quickly create a list of deals that are assigned to a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.

- The **Created By** filter, like the **Assigned To** filter, allows you to quickly create a list of deals that were created by a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.

- The **Priority** filter allows you to create a list of deals that match the given priority.

- The **Stage** filter allows you to create a list of deals that match the given stage.

- The **Deal Type** filter allows you to create a list of deals that match the given type of deal, either new or existing business.

- You can sort any column in ascending or descending by clicking on the column header.

Have a Question?

We'd love to help. If you come across something that does not seem to be working right, or can't find what you are looking for, please send an email to dberry8@wgu.edu.

Thank you for choosing Ashlar!